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City of Tallahassee / Leon County

Community Assessment of the Southern Strategy Area

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April 19, 2004

AngelouEconomics

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AngelouEconomics is pleased to present the Community Assessment to the City of Tallahassee and Leon County as part of the Community and Economic Development Strategy that we are developing for the Southern Strategy Area. This report is divided into two sections, the *Economic & Demographic Assessment* and the *Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis.* The Community Assessment is the first of three deliverables that the City and County will be receiving during a 5-month process. This first report provides the basis from which we will develop recommendations for Community Development and Economic Development strategies.

All reports will be available online at www.GrowSSA.com as they are completed. We encourage you to review them thoroughly and provide us with your comments and insight. Thank you for your input.

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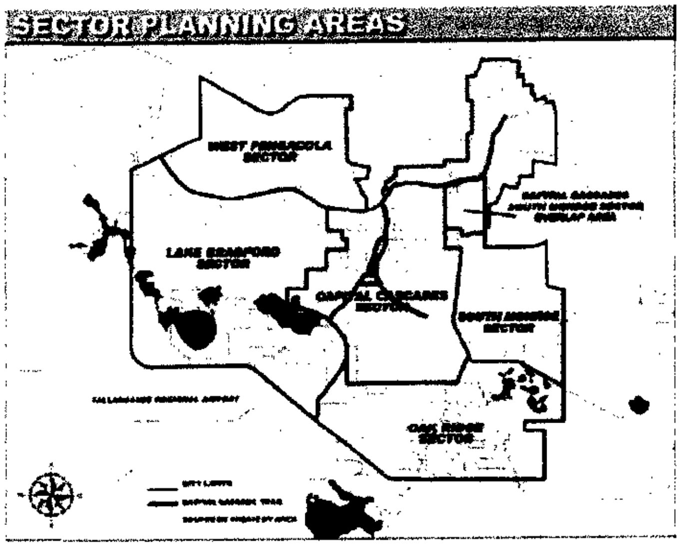
Introduction

The City of Tallahassee and Leon County have taken the initiative to invest in a project called the **Southern Strategy Area Economic Development Plan**. The City of Tallahassee and Leon County hired AngelouEconomics (AE) to help the city in developing specific strategies to guide growth to the Southern Strategy Area (SSA).

AE's main project goal is to position Southern Tallahassee as a premier location for business and commercial development. This will diversify the economy, reduce poverty and unemployment, create more jobs, increase the tax base, and improve the quality of life in the community. Before AE begins developing strategies, we must first understand why growth has occurred in other areas of the region, and what can be done to capture some of this growth for the SSA.



Project Area
The map to the right illustrates sector planning areas that fall within the Southern Strategy Area. All of the Lake Bradford, Oak Ridge and Capital Cascades sectors are within the Southern Strategy Area. Portions of the South Monroe and West Pensacola sectors fall within the SSA.

The area includes Florida A&M University (FAMU), Innovation Park, the Fairgrounds, the Airport, and Tallahassee Community College on its northeast border.

Although this project's focus is the Southern Strategy Area, much of this report focuses on the City, the County and the region since so many of the issues we discuss go beyond the borders of the Southern Strategy Area.

Deliverables
AE will provide the city and county the following three reports:

- ✓ Community Assessment Report (delivered in April)
- ✓ Community Development Plan (delivered in May)
- ✓ Economic Development Plan (delivered in May)

AE will also develop a final presentation on the strategies for improving the economy in the Southern Strategy Area. This presentation will be part of a larger celebration of ideas called an Economic Development Summit. The timeframe for this event is currently being discussed.

Purpose of Community Assessment

The first phase of developing an economic development plan is to determine current conditions in order to learn what issues need to be addressed and to identify strengths that can be promoted to support economic growth. AngelouEconomics (AE), with the assistance of the Advisory Committee and hundreds of individuals who have contributed their input via surveys, focus groups and interviews, has evaluated Southern Tallahassee and Leon County's readiness in five key areas that are integral to the community's economic development:

- **Business Climate**
- **Workforce and Education**
- **Infrastructure and Land Use**
- **Quality of Life**
- **Economic Development Efforts**

These factors are highly important to prospective and existing businesses. By assessing Tallahassee/Leon County's readiness in each of these components, AE and the Advisory Committee will be best able to develop a Five-Year Plan of Action to attract and support business development that match the community's capacity and vision.

The following graphic illustrates where this Community Assessment Report falls within the project timeline for completing Tallahassee/Leon County's Economic Development Strategic Plan for the Southern Strategy Area (SSA). This report forms the foundation for subsequent phases.

Planning Process:

Phase 1 **Project Set-Up** ***Feb-March***	[illegible]	Phase 3 Community Development Action Plan ***May***	Phase 4 Economic Development Action Plan ***May***	Phase 5 Economic Summit ***June***
Project Website Finalize Scope of Work and Contract Appoint Advisory Committee Initial Data Collection Stakeholder Identification	Economic conditions Business climate Education Workforce development Infrastructure Marketing Quality of life	Recommendations: Workforce Development Education Land use Quality of life	Recommendations: Target industries Internal Mktg. External Mktg.	**Event to Celebrate New Ideas**

Survey Results

During this study, a survey questionnaire has been produced and posted on-line for completion, and several hundred hard copy surveys have been distributed to residents in the Southern Strategy Area. The survey's focus is on the perceptions of residents and business owners both within and outside southern Tallahassee/Leon County on various issues related to community and economic development. The survey questions have centered on perceived strengths and weaknesses in the community. This survey will remain active throughout the project, but the survey findings to date have been provided in the Appendix of this document.

The following illustrates the survey respondents who have participated at the date of this report:

- ✓ 116 survey respondents
- ✓ Average annual income is $26-50,000
- ✓ 70% white, 20% black
- ✓ 30% live in SSA
- ✓ 30% work in SSA
- ✓ 50% have lived in Tallahassee/Leon County for more than 15 years

The box to the right illustrates those areas in which respondents are either satisfied or not satisfied by category.

As the table to the right illustrates, Community Colleges, Family Environment, Internet, Equal Opportunity, and Image as a Place to Live rate the highest in overall satisfaction.

Areas that need improvement or that survey respondents are not satisfied with include: Grades 6-8 Education, Growth Management, Value Housing, Public Transportation, Job Availability, and Location for High Tech Activity.

Education
Highest Satisfaction – Community Colleges
Lowest Satisfaction – 6-8 Education

Livability
Highest Satisfaction
1. Family Environment
2. Climate

Lowest Satisfaction
1. Growth Management
2. Good Value Housing

Infrastructure
Highest Satisfaction – High Speed Internet Connectivity
Lowest Satisfaction – Public Transportation

Working Environment
Highest Satisfaction – Equal Opportunity
Lowest Satisfaction – Job availability

General Economy
Highest Satisfaction – Image of the City as a Place to Live
Lowest Satisfaction – Location for High Tech Activity

These survey responses are similar to what AE has heard in the focus groups and interviews that we have conducted throughout the community.

Initial Findings

During the several interviews and focus groups that have been conducted, insights and opinions regarding the Southern Strategy Area's strengths, weaknesses, opportunities, and threats were collected. Statistical data has been gathered and examined as well to contrast the economic realities to public perceptions.

In general, AE has found that Southern Tallahassee is a community in transition with tremendous assets that could be better exploited. The entire city and county are poised to reach its potential with all of the plans that have been developed and funding that is now is being readied to address many of the plans. Typical issues for most communities such as workforce development and utility infrastructure are actually assets in the community. **Other needed improvements in the Southern Strategy Area (SSA) will occur but the full realization of the community can only come with a clear and unified vision from all the stakeholders within and outside this part of town and more participation from the private sector.**

After careful evaluation of all the quantitative and qualitative information, the consulting team has identified **six major issues** that will impact the economic development of Southern Tallahassee/Leon County in future years:

- **Image and Perception**
- **Transportation Access**
- **Entrepreneurial Efforts**
- **Economic Development Efforts**
- **Cooperation and Shared Vision**
- **Planning and Implementation**

<u>Image and Perception</u>

Why is this important? Expanding and relocating companies make site location decisions based on their perception of a community in addition to standard technical analysis. Typically, decision-makers are from outside the community. While a community should have an accurate and positive perception of itself, ultimately, the perception of a community by individuals outside of the area will affect whether investment is made or not.

What is Tallahassee/Leon County's situation?
More than 90% of survey respondents feel that the SSA has a poor image in Tallahassee. Fifty percent of respondents feel that Tallahassee/Leon County has a bad perception in Florida. The external image of the city/county is a sleepy, college town that is run by government. Residents and businesses within the area are proud of their community and the quality of life that they enjoy. The image of the SSA is a poor, dangerous community whose schools are outperformed by the rest of the county. As the data demonstrates, the high school is competitive with others in the area, but some of the elementary and middle schools in the SSA do need to make some improvements. Crime is not that much worse than the rest of town, yet incidents of crime in schools in the south are significantly higher than other areas of the county.

The first image that a business prospect has of Tallahassee and Leon County is the one they get when driving into the city from the airport. The gateway into the city passes by a detention facility, a wastewater treatment plant, a school with chain linked fence around it, scattered and dilapidated mobile homes, as well as open storage and poor screening of automobiles that are waiting to be repaired. Cleaning up this first impression of the community will yield positive results. **Building the internal image of the SSA will ultimately improve the external image of Tallahassee/Leon County.**

Transportation Access

Why is this important?
Businesses need to get goods and services to and from their location in a predictably efficient manner. Otherwise, it adds a cost to doing business. Additionally, the employer's labor force needs good access to businesses from residential areas, whether that is via roads for private vehicles or reliable public transportation.

What is Tallahassee/Leon County's situation?
Transportation access to and from the SSA is not good. The airport serves the region, but transportation access to the airport from other areas of town is poor. Widening of Capital Circle will help, but what is needed is a seamless parkway dedicated to moving people and goods to the airport from homes and businesses throughout the three-county region. **One of the major impediments to Innovation Park's success has been transportation access.** This is also one of the major reasons why some of the business parks near the airport have not flourished. Adding additional lanes along Capital Circle will help but will not provide the type of direct access to the airport from I-10 that is needed to have a positive impact throughout the region.

Additionally, public transportation offered through TalTran is rated poor in the SSA and census figures show that many residents within that area do not have cars and rely on public transportation. Yet, TalTran provides bus service to this area of town on at least an hourly basis from morning through evening. The bike and pedestrian program is excellent and could prove to be a useful tool in redevelopment efforts of the SSA.

Entrepreneurial Assets

Why is this important? Major corporate relocations and expansions are rare in the United States. It has been estimated that there are roughly 1,400 expansion and relocation projects in the United States every year with 14,000 economic development organizations competing for them. Additionally, traditional manufacturing operations are moving off shore. Seventy percent of jobs in the future will come from entrepreneurial endeavors. The communities that have a successful entrepreneurial environment will be successful in generating new jobs and investment.

What is Tallahassee/Leon County's situation?
The Bethel Community Development Corporation and the Tallahassee Economic Development Council have several programs to aid business startups and expansions in the SSA. There is no formal business incubator in the community, although several businesses and the Tallahassee Community College provide space for business startups. Both FSU and FAMU have programs to aid in community development as well as technology transfer. Innovation Park is underutilized and may never reach its potential with the current governing structure and lease arrangement. Recently, there has been discussion of a Virtual Incubator that could be supported by both universities and economic development interests. There are several large companies such as Mainline Information Systems and Taxalog which have been successful local business start-ups. This type of homegrown business development seems to be the type of business development that nearly everyone AE has talked to would like to see grow in the community.

Economic Development Efforts

Why is this important? At its most basic level, economic development is marketing for a community both internally and externally. Internal marketing builds understanding, support, and excitement regarding the importance of economic development and where the community is going. A community must market itself externally so that it is recognized by the outside world as an attractive location for business. With intense competition for new growth, a city must have a strong economic development program if it is going to create the future environment that the public wants.

What is Tallahassee/Leon County's situation?
Economic development is being done by several entities (see the *SWOT Economic Development Efforts* section for more details). AE finds that the most successful economic development organizations in the community are the Greater Tallahassee Chamber of Commerce and the Economic Development Council. Although the City has a very experienced economic development veteran, much of his efforts are being spent facilitating the creation of the downtown Community Redevelopment Area. The two universities and Tallahassee Community College are great assets to economic development. Florida State University, Florida A&M University, and Tallahassee Community College have recently hired new presidents. In addition, the colleges have good relationships with each other and are committed to working together and other community stakeholders in improving the economy. The private sector is also actively supporting many of these efforts.

Marketing efforts can be improved. External marketing for the City/County is mostly performed by the Chamber, Great Northwest and Enterprise Florida. The Convention and Visitors Bureau and the Cultural Resources Commission help promote the area for tourism development. All of these efforts are good, but consideration should be given to a combined regional marketing effort focused on changing the image of the region to attract target business sectors. Additionally, marketing current and future community development improvements in the SSA will further encourage private sector investment into the SSA.

Cooperation and Shared Vision

Why is this important?
Before businesses make significant private sector investment they want to know that there is reliability of utilities, development costs, and public sector commitment. When businesses witness conflict between two local elected bodies, they become concerned about the predictability of having their business in that community. It also sends a signal of a divided community. Economic development is highly competitive – communities offer similar labor forces, infrastructure, and incentives. Often times, businesses make their final site selection decisions on more qualitative factors such as cooperation among local elected bodies.

What is Tallahassee/Leon County's situation?
One of the most common issues we have heard in focus groups and interviews is that the City and County do not share a common vision for Economic Development. There seems to be an unusual amount of tension between the two governments manifested in the recent discussions related to the downtown Community Redevelopment Area. Yet, in reviewing information about each entity's major economic development goals, both express a similar interest in enhancing the excellent quality of life in the area through education, community development, and quality business development. The perception of the city and county not having a similar vision stems from the apparent and persistent debates between the city and county on various issues.

The City and County have and continue to cooperate on several fronts such as the City/County Planning Department and Innovation Park. There is agreement on many issues, but a more unified vision for economic development that is shared among the City, County, Economic Development Council, Chamber, universities, private sector, and the rest of the community will be an important step for the community.

Planning and Implementation

Why is this important?

Developing a plan is a good first step in solving a problem and accomplishing a goal. Implementing the plan is often the most difficult step to take. The community and private sector want to see the public sector follow through on plans that they have commissioned. This willingness to implement indicates to local residents and businesses that the public sector is committed to making their community better.

What is Tallahassee/Leon County's situation?

Several very good plans have been developed for southern Tallahassee/Leon County including the South Monroe Sector Plan and the Southern Strategy Area Plan. Much of what AE has found in reading through these past plans, completed nearly three years ago, is similar to what AE has found in our initial assessment. Entities have worked hard at gathering funds and laying the groundwork to address several of the recommendations presented in these earlier plans. The private sector must continue to support recommended initiatives and the public sector must be unified in their approach to implementing this plan and others. **With a shared vision for economic development, and active participation from the private sector, the implementation of the plans that are developed will be more successful.**

Identifying these major areas during the initial phase of this project will help AE and the Advisory Committee develop appropriate recommendations to improve the economy in the Southern Strategy Area and allocate resources to projects which will have the most direct positive impact on residents and businesses.

Economic & Demographic Assessment

Overview

An overview of the data shows two sides of the Southern Strategy Area. On one hand, the Southern Strategy Area suffers from the same problems typical of any depressed neighborhood; on the other hand, there are some key assets that, properly handled, can bring prosperity.

Southern Strategy Area at a Glance	
Population, 2000**	30,806
Net Population Loss, 90-00**	397
% Change, 90-00**	-1.3%
% Population Age 0-13 years*	22.7%
% Adults with a Bachelor's Degree or Higher*	23.6%
% of Workforce in Blue Collar Occupations*	41.2%
Per Capita Income*	$11,773
Median Home Value, 2000	$55,472
Households Without Vehicle	19.8%
% Population Below Poverty Line**	33.8%

Sources. 2000 Census; *DecisionData 2003 Estimates; **Tallahassee - Leon County Planning Dept

The Southern Strategy Area is unlike any other area of Leon County. Not only is the demographic composite opposite the **rest of the county**, its economic patterns are out of sync as well. It was the **only neighborhood in Tallahassee to decline in population during the 1990s**. The largely blue-collar workforce, on average, earns much less than the average metro resident. Over one third of the population lives below the poverty line. This has led to perhaps the Southern Strategy's biggest problem – **public perception**.

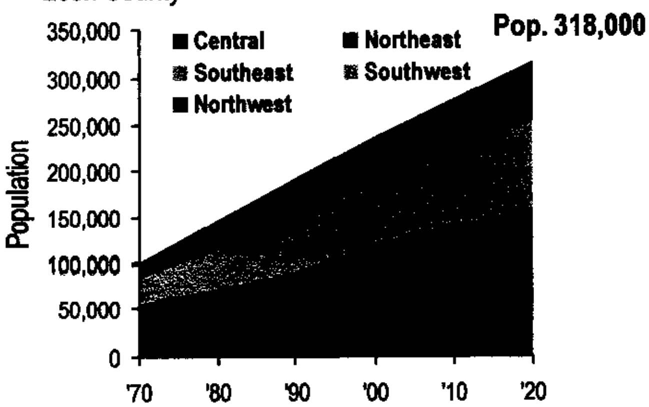
Public perception, however, can be changed, and by focusing in on a few key strengths, the Southern Strategy Area can become a desirable place to live and do business. Two local universities and a community college have total enrollments of about 65,000 students. Affordable rents and developable land make the SSA attractive to developers targeting the student population. Other developers have also begun to take notice of the area's affordable office and industrial space. A number of single- and multi-family homes, commercial, and industrial projects are currently underway throughout the Southern Strategy Area.

Demographic & Economic Conditions

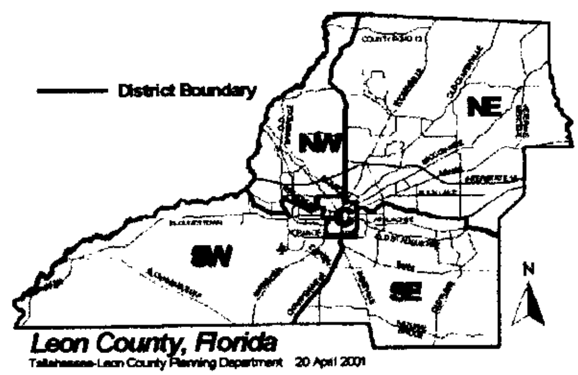
A Role in Regional Growth

Tallahassee and Leon County have seen **moderate growth** over the past three decades. Population increased by 25 percent in Leon County during the 1990s. Forecasts show growth to slow a bit further to about 15 percent through 2020. Northeast Leon County is expected to hold over a third of the population, with 115,000 people by 2020.

Population Growth, 1970-2020
Leon County



Source: Tallahassee-Leon County Planning Dept



The Southern Strategy Area has missed out on the regional growth occurring in Greater Tallahassee and the surrounding area.

- The Southern Strategy Area was the only part of the county to see **negative growth** during the 1990s.
- The fastest growing areas in Tallahassee were to the east – **Northeast and Southeast Tallahassee.**
- Wakulla County, just south of Leon County and with access to the coast, saw a phenomenal growth rate of **61 percent** during the 1990s.

The SSA falls within portions of the SW, SE and Central areas of the County.

Regional Population Growth

	Population 2003	% Growth 1990-2000
Counties		
Leon	246,013	24.4%
Gadsden	45,362	9.7%
Wakulla	25,807	61.0%
Cities		
Tallahassee	154,674	17.2%
Wakulla		
Monticello	2,747	5.3%
Quincy	7,027	0.5%
Neighborhoods*		
SSA	30,806	-1.3%
Central	40,806	6.9%
Northeast	79,738	46.3%
Southeast	37,093	25.7%
Southwest	30,095	11.6%
Northwest	51,711	19.4%

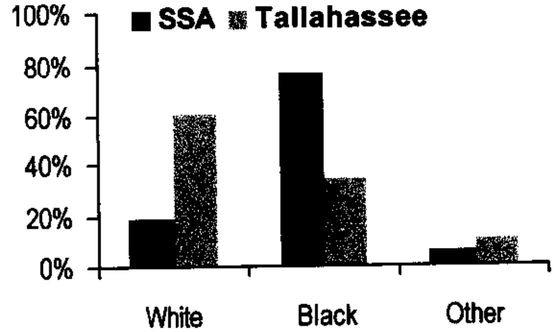
source: US Census Bureau; City of Tallahassee
*Neighborhood populations are for 2000

Demographic Trends

The racial composition of the Southern Strategy Area and the City of Tallahassee are almost **perfect opposites**. Over 90 percent of each area's population is composed of white and black, and other races make up less than 10 percent of each area.

- Whites make up 60 percent of Tallahassee and 19 percent of the Southern Strategy Area.
- Blacks make up 34 percent of Tallahassee and 77 percent of the Southern Strategy Area.
- All other races represent the minorities of the areas, making up 10 percent of Tallahassee and 7 percent of the Southern Strategy Area.
- The white population in the Southern Strategy Area decreased by 36 percent from 1990 to 2003, while the black population increased by 12 percent.
- The white population in Tallahassee grew by 3 percent from 1990 to 2003, while the black population grew by **41 percent**

Racial Composition, 2003

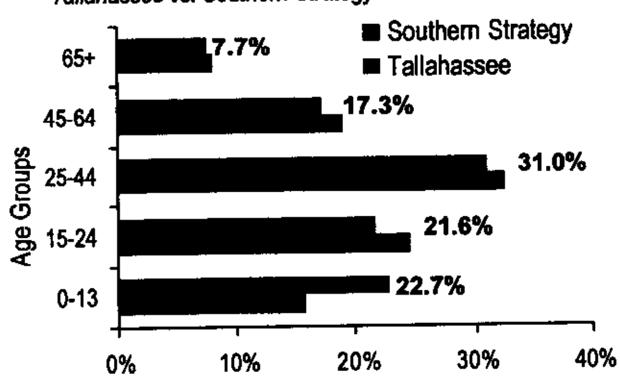


Source: US Census Bureau, DecisionData

Tallahassee and the Southern Strategy Area have very young populations.

- The age distributions in Tallahassee and the Southern Strategy Area are relatively the same, with the median ages at **28 and 27**, respectively.
- The Southern Strategy Area does have a much larger percentage of children below the age of 13.
- According to the U.S. Census Bureau, in 2000 Tallahassee's median age of 28 made it the **youngest city in the state**; Leon County was the second youngest county.
- Two critical demographics to study are the 25 to 44-year olds and the 45 to 64-year olds. These groups respectively represent the early and late career workforce.
- Tallahassee's percentage of those in the early career age group is slightly higher than the Southern Strategy Area's share of 31 percent.

Age Distribution
Tallahassee vs. Southern Strategy Area



Source: US Census Bureau, DecisionData

Workforce & Employment

The workforce needs of Southern Strategy residents differ from those of the rest of the city and county.

- 41 percent of Southern Strategy workers are employed in **blue-collar jobs** according to the Census definition. The Tallahassee average, on the other hand, is as low as 25 percent.
- Likewise, average wages and per capita incomes are much lower in the Southern Strategy Area. The average SSA per capita income is **57 percent that of the Tallahassee average.**
- Availability of transportation and nearby job opportunities are also more important to the residents of the Southern Strategy Area, as almost one in five households are without a vehicle.

Workforce Characteristics

	SSA	Tallahassee	Leon County	Florida	U.S.
Average Wage, 2003	$31,395	$47,185	$57,270	$57,270	$60,600
Per Capita Income. 2003	$11,773	$20,620	$22,802	$23,085	$23,201
Occupation, 2000					
Blue Collar	41.2%	25.4%	26.1%	38.7%	39.3%
White Collar	58.8%	74.6%	73.9%	61.3%	60.7%
No Vehicle in Household, 2000	19.8%	8.8%	7.1%	8.1%	10.3%

source: US Census Bureau; DecisionData

Both Leon County and the Southern Strategy Area have very high concentrations of retail and services employment.

- Nearly **70 percent** of the workers in the Southern Strategy Area work in the retail, services, or transportation industries.
- Of these, the service industry is the only one with strong employment growth over recent years.
- Retail employment increased by less than a percentage point in Leon County between 1998 and 2001.
- The big losers countywide were manufacturing, real estate, and construction, which all saw declines in employment.

Employment and Establishments by Industry

	% of Total Employment		% of Total Establishments	
Industry	SSA	Leon County	SSA	Leon County
Agricultural, Forestry, Fishing	0.37%	0.92%	0.83%	1.73%
Construction	6.77%	3.93%	10.12%	6.27%
FIRE	6.00%	5.21%	6.40%	9.61%
Manufacturing	7.20%	2.40%	3.82%	1.80%
Mining	0.02%	0.01%	0.10%	0.02%
Public Administration	5.59%	20.27%	2.07%	1.84%
Retail Trade	19.72%	22.05%	21.59%	18.71%
Services	34.85%	36.41%	43.29%	52.05%
Transportation and Communications	12.88%	5.48%	3.93%	2.51%
Unclassified	0.35%	0.98%	1.96%	2.22%
Wholesale Trade	6.25%	2.34%	5.89%	3.24%

source: DecisionData, 2003 estimates based on InfoUSA

Industry Growth, 1998-2001

	Employment		Payroll		Average Wage,
	Leon County	Florida	Leon County	Florida	Leon County 2001
Utilities	18.4%	-0.1%	28.5%	12.7%	$49,293
Construction	-2.9%	8.0%	21.8%	23.1%	$29,896
Manufacturing	-11.2%	-3.7%	1.3%	7.9%	$33,243
Wholesale trade	-0.3%	4.3%	17.6%	20.3%	$37,692
Retail trade	0.8%	4.9%	11.8%	21.1%	$17,538
Trans, Warehouse	1.1%	0.2%	20.7%	10.7%	$28,120
Information	7.5%	23.4%	6.7%	40.1%	$32,762
Finance & insurance	8.3%	15.1%	11.3%	24.4%	$38,389
Real estate	-8.8%	11.1%	10.6%	33.8%	$23,023
Prof, sci, tech svcs	21.4%	16.4%	44.5%	31.4%	$55,719
Mgmt of companies	348.7%	22.9%	70.1%	30.5%	$16,652
Admin, support	21.2%	47.8%	54.1%	81.9%	$20,910
Educational services	33.4%	27.8%	64.1%	37.0%	$23,814
Health and social asst	15.7%	3.8%	29.4%	16.5%	$32,287
Arts, entertainment, rec	21.4%	9.7%	93.8%	22.0%	$21,113
Accomm, food svcs	5.1%	2.8%	18.1%	15.3%	$9,734
Total	**8.3%**	**11.7%**	**26.3%**	**26.5%**	$27,646

source: Census Bureau County Business Patterns

- Utilities, Professional/Scientific/Technical Services, Management of Companies, Educational Services, and Arts/Entertainment/Recreation services all experienced significant gains in employment from 1998-2001.

Housing

The Southern Strategy Area offers affordable housing in Tallahassee.

- Comparing Census data with the current market report shows a large increase in rents since 2000, though Southeast Tallahassee continues to have **rates considerably lower than the rest of the region**.
- The 2000 Census showed median home values in the SSA to be 55 percent of the county average and rental rates to be 70 percent of the county average.
- These relative differences are most likely still valid today.
- In October of 2003, apartment rental rates in the Southeast averaged **$669, or $0.69 per square foot**.
- SSA has lower rates of owner-occupied housing units and equal rates of resident turnover.
- The area, however, has traditionally had a larger percentage of vacant residential properties, with **over 21 percent sitting unoccupied in the 2000 Census**.

Area Housing, 2000

	SSA	Leon County
Housing units		
Owner-occupied	39.9%	52.9%
Renter-occupied	45.8%	40.0%
Vacant	21.4%	7.1%
Yearly turnover	31.0%	31.0%
Median home value	$55,472	$100,373
Median monthly rent	$344	$490

Source: U.S. Census Bureau, 2000

Tallahassee Apartment Market Report, October 2003

Quadrant	Total Units	Vacancy Rate	Avg Sq Ft	Avg Rent / Mo	Price / Sq Ft
Northeast	2,680	6.3%	948	$704	$0.74
Northwest	6,876	3.9%	1,026	$827	$0.81
Southeast	3,702	3.5%	971	$669	$0.69
Southwest	4,143	4.8%	842	$734	$0.87
Total	**17,401**	**4.4%**	**958**	**$752**	**$0.78**

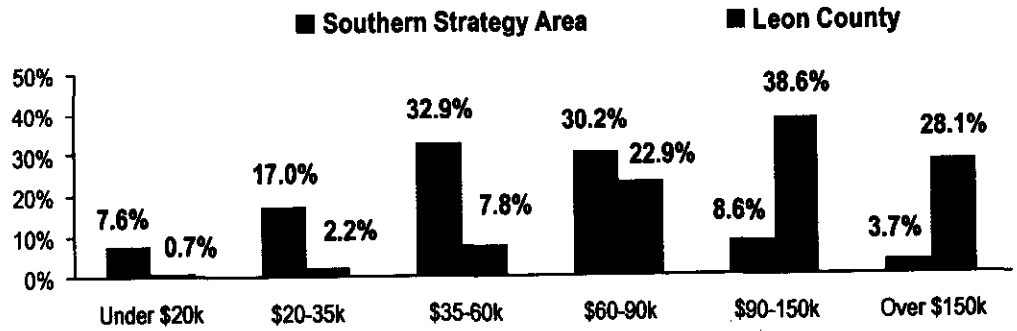
source: EDC of Tallahassee/Leon County, Carolinas Real Data

The graph below shows the large difference in the distribution of home values in the Southern Strategy Area compared to Leon County.

- The Southern Strategy Area has virtually no homes in the higher price ranges, with **less than 4 percent of its homes valued over $150,000**. By comparison, the countywide average is more than 7 times higher.
- Locally, the perception of the Southern Strategy Area is poor, with attitudes towards livability very low. Many of the people interviewed remarked about the large number of mobile homes in the area. The Census Bureau reports that nearly **19 percent** of all SSA housing units were mobile homes in 2000, compared to 11 percent for Leon County.

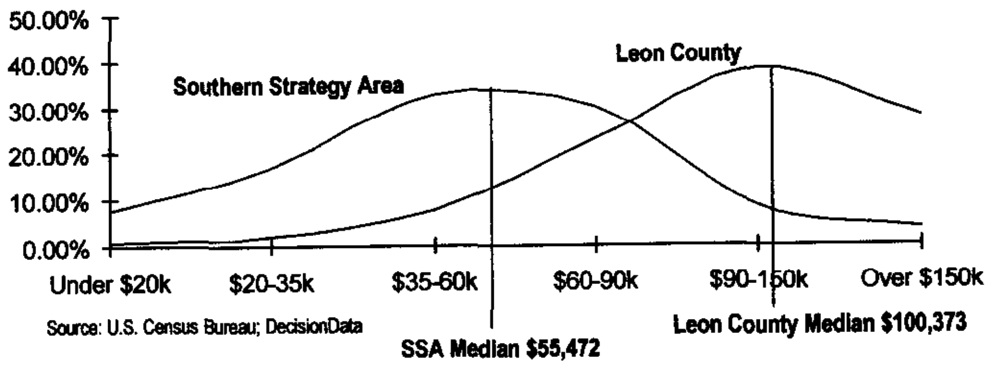
The following graphs provide similar data but illustrate different perspectives. *Home Values, 2000* shows the actual percentage of homes by value. *Distribution of Home Values, 2000* shows the median home values in the SSA versus Leon County.

Home Values, 2000



Source: U.S. Census Bureau; DecisionData

Distribution of Home Values, 2000



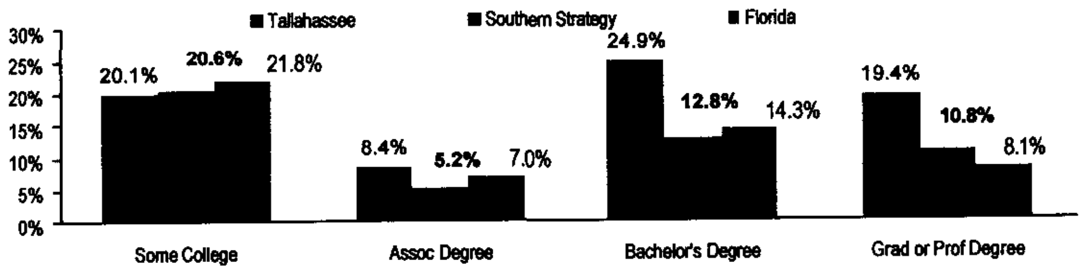
Source: U.S. Census Bureau; DecisionData

Education

The educational attainment of Southern Strategy residents is low.

- Florida, in general, has educational attainment levels very similar to that of the U.S. In comparison, the Southern Strategy Area is very comparable to the state. **The area, in fact, has a higher percentage of residents with a graduate or professional degree than the rest of the state**.
- Tallahassee, however, benefits from a large student population, many of which stay in the area after graduation. This gives the city extremely high rates of people with some form of higher education.
- Regionally, the SSA has a fairly poor showing, especially considering both the city's major universities are nearby.

Educational Attainment Comparison
Adults 25 years or older



K-12 Education

The Southern Strategy Area is served by Rickards High School and a number of elementary and middle schools.

High School Performance Statistics, 2002-2003 School Year

	Dropout Rate	SAT		ACT		FCAT(10th Grade)	CPT
	%	% taken	Avg. Score	% taken	Avg Score	% Passed	% Passing
Florida	3.10%	47.3%	992	31.9%	20.3	58%	58%
Leon County	2.70%	59.2%	1057	44.2%	21	72%	61%
Rickards HS	1.80%	50.7%	1087	56.9%	19	62%	45%

source: Florida Dept of Education

- Rickards HS students performed slightly better than the state average on both the SAT (average score of 1087) and on the FCAT (62 percent 10th grade pass rate).
- Rickards High School also maintains a drop out rate below the county and state averages.
- While data is not entirely comparable, Leon County elementary and middle schools are well above the state average spending per pupil in elementary and middle school; where as the spending for the SSA is on par with the state average.
- The stability rate (a measure of students that begin the school year and are still enrolled at the beginning of the spring term) of the middle and elementary schools in the SSA is comparative to the state and only

slightly lower than thecounty. Generally, lower income students have a lower stability rate, yet the SSA also has more students on the free/reduced lunch program than in the state or county.

- One notable fact is the amount of violence in the elementary and middle schools. "Incidents of violence" include: possession of drugs, weapons, violent acts towards persons and property, fighting and harassment, and other nonviolent incidents and disorderly conduct. The numbers that the department of education gives are much higher in the SSA than those of the state and county.
- English Language Learners (ELL) often skew the data for standardized tests, because the student is trying to learn a new language and new skills at the same time. The percentage of ELLs in all SSA schools is lower in than the state average.

Southern Strategy Elementary and Middle School Performance

		Stability*	Free/Reduced Lunch %	Per pupil Incidents of crime	School's Grade	ELL %	Expenditures per pupil (regular)
Middle Schools	Belle Vue	93.1	74	28.3	C	4	$4,668
	Raa	95	22.8	4.6	A	1.7	$4,486
	Fairview	94.6	51.1	10.9	B	0.1	$4,370
	Nims	88.1	71.5	25.6	C	0	$4,864
	Leon County	94.4	34.4	11	N/A	0.8	$7,576
	State	93.7	47	8.9	N/A	5.3	$4,488
Elementary Schools	Oak Ridge	91.6	86.6	1.9	C	0.3	$4,806
	Wessons	84.9	96.3	22.7	C	0	$6,284
	Bond	91.9	88.6	6.8	D	0	$5,536
	Pineview	89	76.8	3.9	B	8.9	$5,440
	Brevard	92.2	90.8	6.3	C	0.5	$4,804
	Sabal Palm	92.4	81.5	6.4	A	0.6	$3,711
	Leon County	94.7	43.9	2.7	N/A	0.9	$7,576
	State	93.7	52.9	2.1	N/A	9.7	$4,488

source: Florida Dept of Education. *Stability is the percentage of students from the October membership count who are still present in the second semester (February count). District and state-level data is calculated by school type

Area Universities

The large student population of area universities represents an opportunity for the Southern Strategy Area.

- The Southern Strategy Area has access to two large universities and an excellent community college. Florida State University lies on the northern border of the area. **Florida A&M University lies completely within the SSA**. The Tallahassee Community College borders the SSA, but residents and businesses within the SSA utilize their services. The TCC is considering expanding its facilities into the SSA.
- The two universities have a total enrollment of nearly 50,000 students, including 37,300 at FSU and 12,100 at FAMU. TCC has an enrollment of 14,500 students.
- The area, with low rents and developable land, has the potential to serve this large student population. Most FSU students currently live north of campus and outside of the Southern Strategy Area. The SSA, however, completely surrounds FAMU and is home to many of its students.
- In 2000, 76% of FAMU students lived off-campus, and 84.4% of all FSU degree seeking undergraduates lived off-campus.
- These schools also graduate over 10,000 people annually, carrying with them a large amount of earning potential (see chart below).

- Right now, most graduates stay within Florida, finding jobs in Tallahassee and the other major metros. Few, however, choose to settle within the Southern Strategy Area.

- Business programs have the highest total number of graduates, 1909, with national starting salaries of $38,000. Education and Political Science has the next highest number of graduates. Engineering and Architecture with 12.7% of FAMU undergraduates has the highest starting salary of $49,000.

Graduates from Selected Programs

	Florida State University Total Annual Graduates (2002-2003)				Florida A&M Total Annual Graduates (1999-2000)					
Selected Programs	Percent Under Graduate	Under Grad	Graduate	Total	Percent Under Graduate	Under Grad	Graduate	Total	FSU and FAMU Total	Starting Salaries. National Average
Engineering, Architecture	2.2%	139	51	190	12.7%	186	26	212	402	$49,000
Math, Sciences	4.7%	299	181	480	14.6%	214	29	243	723	$39,000
Information Studies	4.0%	253	181	434	4.0%	58	0	58	492	$38,500
Business	22.8%	1,445	160	1,605	14.7%	215	89	304	1909	$38,000
Nursing, Allied Health	2.4%	149	15	164	14.4%	211	137	348	512	$38,000
Education	8.1%	516	494	1,010	13.7%	201	117	318	1328	$31,000
Communication, Media	5.0%	319	104	423	5.6%	82	5	87	510	$30,500
Political Science, Sociology	14.6%	922	176	1,098	3.4%	50	20	70	1168	$29,500
History, Humanities	8.7%	550	101	651	4.4%	65	0	65	716	$29,500
English, Foreign Languages	5.3%	338	82	420	1.8%	26	0	26	446	$29,000
Visual & Performing Arts	7.4%	467	200	667	1.8%	26	0	26	693	$28,500
Criminal Justice	5.4%	339	19	358	6.1%	89	0	89	447	$28,000
Social Work, Family Sciences	9.5%	599	170	769	2.9%	43	10	53	822	$25,000
Law	0.0%	0	242	242	0.0%	0	0	0	242	$72,300
Total of all Programs	100.0%	6,335	2,176	8,511	100.0%	1,466	433	1,899	10,410	$33,000

sources: FSU; FAMU; National Association of Colleges and Employers Survey

Planned Developments

With **ample affordable land**, the Southern Strategy Area has a number of projects being planned, representing all types of developments. The development of 70 single family homes, 374 apartments, and more than 250,000 square feet of commercial space is being planned for the SSA. Continued cooperation between the City and private developers will bring more opportunities the southern part of town. Infrastructure, primarily road infrastructure has been cited as a major deterrent to growth in the SSA.

Currently Planned and Proposed Projects in the Southern Strategy Area

Project	Description
Crawfordville Trace	45 detached single family homes have been permitted on 31 acres
Greens at College Club	46 four-bedroom apartments on 5.8 acres
College Club, Phase II	40 apartments on 4.3 acres
Adams Place Apartments	180 apartments on 13.8 acres
University Gardens	108 apartments on 8.1 acres
Medical Commons	Mized use with 25 single family homes and 15,320 commercial sq ft on 10 acres
Airport Commerce Center PUD	189,000 commercial square feet on 76.5 acres
HTS Enterprises Inc	46,846 commercial square feet for warehousing on 4 acres
Capital Circle Industrial Park	Proposed 15 lot commercial subdivision on 15.8 acres

source: Tallahassee - Leon County Planning Dept

Tallahassee Office Market Survey, 1st Quarter 2004

	Sq Ft Surveyed	Vacancy Rate	Asking Rents
Downtown	954,452	8.6%	$21 - $25
Northeast	1,282,743	9.2%	$12 - $22
Northwest/West	1,467,018	20.7%	$12 - $16
Southeast	2,906,555	10.0%	$12 - $17
Total	**6,610,768**	**12.0%**	**$12 - $25**

source: EDC of Tallahassee/Leon County, Coldwell Banker Hartung & Noblin

SWOT ANALYSIS

Overview

The City of Tallahassee and Leon County are extremely active in their willingness to plan when addressing challenges. Several plans have been completed in recent years including the South Monroe Sector Plan, the Innovation Park Plan (University Park), and the Southern Strategy Area Plan. **These plans offer similar recommendations related to gateway improvements, concurrency costs, transportation access, workforce and education, and crime perceptions.**

Many of the challenges mentioned in this report will come as no surprise, since many of them have been mentioned in previous plans. Assessing the major issues facing the community is an important and necessary part of our process, providing a context so that we can determine the appropriate recommendations. **If the plans that have been or are being constructed are successfully implemented, the majority of the problems of quality of life facing the community will be corrected.**

This report will view these challenges strictly from an economic development perspective and how they relate to the creation and attraction of jobs and investment into the community. Although the project focus is the Southern Strategy Area, AE also looks at city, county, and regional issues that could impact the SSA.

This chapter provides an inventory of the area's strengths and weaknesses and assesses the degree to which they support future economic development. Our analysis is based on significant input collected at the local level during focus groups, industry interviews, and discussions with staff.

In the following sections, we examine five critical topics for the City of Tallahassee/Leon County:

- Business Climate and Entrepreneurship
- Workforce & Education
- Sites and Infrastructure
- Quality of Life
- Economic Development Efforts

We focus on points that will influence location and expansion decisions of businesses and their site selection consultants. We do not intend this for SWOT analysis to be all-inclusive. **Rather, we discuss areas that will have direct impact on the future economic development efforts of the City of Tallahassee/Leon County.**

In the initial phase of this project, we conducted focus groups, interviews, and distributed surveys via the project website, **www.Grow SSA.com,** to gather community input. By receiving input from a broad base of individuals and business representatives, we are able to understand how the factors listed are perceived. It is important to examine the self-perceptions that are prevalent in Tallahassee/Leon County because it directly relates to the region's ability to position itself for new investment. Understanding Tallahassee/Leon County's assets and weaknesses will allow us to form recommendations for the Southern Strategy Area.

We characterize our "SWOT" in these terms:

- **Strengths (Positive, Internal):** Positive attributes currently present in the City of Tallahassee/Leon County, particularly in comparison to com petitors and the U.S.
- **Weaknesses (Negative, Internal):** Local issues or characteristics that limit the current or future growth opportunities for the City of Tallahassee/Leon County
- **Opportunities (Positive, External):** External factors that offer the City of Tallahassee/Leon County potential for remedying its weaknesses
- **Threats (Negative, External):** Trends that threaten the City of Tallahassee/Leon County's future and attractiveness to new industry

Strengths Positive Internal	***Opportunities*** Positive External
Weaknesses Negative Internal	***Threats*** Negative External

The findings presented in this report reflect the collective effort and input of numerous individuals representing both the public and private sectors. We thank them again for their time and commitment to this project.

Business Climate and Entrepreneurship

	Strengths	**Opportunities**
BUSINESS CLIMATE AND ENTREPRENEURSHIP	• Skilled technical professionals • Affordable talent • Small Business Success Stories • Lowest lease rate values, affordable for small businesses • Competitive wages • Enterprise Zone	• Innovation Park • Fledgling initiative for Virtual Incubator • New economic development leadership • Private sector involvement • State Government (associations) • Homeland Security
	Weaknesses	**Threats**
	• Common Economic Development Vision • Lack of private sector participation in economic development • Little funding for start up businesses	• City/County relationship

The business climate is at a competitive disadvantage in Tallahassee and Leon County, but there is optimism among business leaders that the business climate is changing. Basic labor force skills for entry-level jobs are poor, while the wages for professional jobs are high. **The perspective of site selectors outside of Tallahassee/Leon County is that the community is a sleepy college town dominated by government.** It is true that the major employers in the community are universities and state and local government, but there have been several private sector successes in the area that can be further capitalized. Entrepreneurial activity is relatively low compared with similar sized communities, **although efforts are underway to change how the community encourages and fosters entrepreneurial growth. With improvements in intergovernmental cooperation and slight modifications to land development code and enforcement, the business climate will improve dramatically.**

However, there are aspects of the business climate that will hold back the economic growth of the community if not confronted. These include:

- **The role of the universities in economic development**
  Many question the role of the universities in economic development. Nobody questions the impact that the universities have related to their local spending, student housing/spending, faculty/staff housing/spending, and visitor spending. This is all very significant but **what most question is how both FAMU and FSU can play a more active role in economic development.** Technology transfer becomes the first logical area of focus. For FSU, a liberal arts university, technology transfer takes on a different face than one might see at a Georgia Tech University, for example. FSU has had some success with Taxalog and other similar ventures, but the majority of technology transfer is actually community-based transference. For example, a professor at FSU has specialized in unique education and outreach programs to address issues related to high infant mortality rates. Given that this area of the country suffers from a very high infant mortality rate, this type of transfer of knowledge to the community, albeit not creating direct jobs, provides a needed program to the community. FAMU has a robust physics and pharmacy program but they also provide community development assistance in the way of mentoring and community liaising.

- **The lack of engagement of the business community in the city's future**
  Many of the participants in focus groups and interviews question the ability of the City/County to carry out the plans that have been developed to improve the SSA. **AE has found in its work throughout the United States that it is**

very difficult for the public sector alone to implement plans without the private sector supporting and pushing the implementation. The two chambers have done a good job encouraging private sector participation on their boards and through their membership. The Blueprint 2000 initiatives are funded mostly through an additional sales tax via the private sector, but initiatives such as entrepreneurial development, private sector partnerships with the school and workforce providers, and other similar initiatives could be improved.

- **The perception of the city as a sleepy college town and state capitol**
  This perception is true - Tallahassee/Leon County is dominated by the government sector and universities. However, other southern capitols that are also college towns have transitioned themselves into more diversified private sector economies. This change largely needs to come from the government – recognizing that there are certain impediments to growth that should be modified such as concurrency and permitting so that community stands on an even footing with its regional competitors.

- **The lack of entrepreneurial support and focus**
  Innovation Park was envisioned as the research and development park that would bring private sector investment to southern Tallahassee and Leon County. The majority of activity in the Park, however, is university-related with very few private sector businesses occupying space in the park. Several individuals in focus groups and interviews question the organizational structure of the park authority that may be inhibiting the parks success and putting it at a competitive disadvantage with research parks in the southern United States. The University Park Plan and Education Quadrant concept both merit serious consideration, but the private sector needs to be actively engaged in the implementation of these initiatives.

  There is a groundswell of support and enthusiasm for developing a virtual incubator that could be supported by all the universities. With a virtual incubator, office space is not always provided and some of the other amenities of a true incubator are also not part of the opportunity, but the benefits are that it is less costly to the business start-up. A virtual incubator still helps a prospective company get into solid position to launch its core business, but without all of the brick and mortar costs associated with a traditional incubator. This could prove to be a useful model for the community.

- **Capturing the college graduates**
  If there is one area that everyone agrees is an asset that hasn't been fully developed is how to retain the 7,800+ annual graduating students from FAMU and FSU. One area that could work to address the departure of the FSU/FAMU graduates is providing more business start-up assistance and business plan competitions with university students. Entertainment and job opportunities are certainly the key reasons why many leave the community. Gaines Street redevelopment may help in providing additional entertainment venues, but South Monroe may also provide additional opportunities.

Workforce and Education

	Strengths	Opportunities
WORKFORCE AND EDUCATION	• Tallahassee Community College • Florida A&M University • Florida State University • Leon County Schools • New Medical School • Pharmacy School • Workforce Plus • School Bond Funding	• Community Development Initiatives of the universities • Engineering School • Community College expansion into SSA • Cooperation among university Presidents • Southside Professional Development Schools Network
	Weaknesses	**Threats**
	• Direct Technology Transfer from FSU and FAMU • Flight of college graduates outside of Tallahassee/Leon County • Low skill levels of high school graduates and dropouts • Incidence of crime in SSA schools	• Community leadership not understanding the benefits of the universities • Perception of low-performing schools in SSA. • High wage levels compared with benchmarks

Southern Tallahassee/Leon County provides an abundance of skilled workers across a variety of industries with universities and training institutions that can service the needs of industry. However, with the exception of university students and professors the area's workforce is challenged by poor skills and low educational attainment.

The community college is exceptional – both programs and leadership. **With the excellent higher education programs of Florida A&M University and Florida State University, the community is well served in higher education and workforce training. Many local leaders feel that the higher education facilities are the top assets for economic development.** Everyone recognizes the need to improve basic skill development so that entry-level positions are filled with applicants with basic job skills who can complete an application and read a ruler. The workforce developers, universities, community college, and schools all recognize this issue and are working to address it.

However, there are aspects of workforce and education that will hold back the economic growth of the community if not confronted. These include:

- **Improving basic skills training in K-12**
  Overwhelmingly, the one area that businesses feel needs to be improved is the education of middle and high school students so that they are better prepared for job placement. There is a sense among the business community that the early drop out students are the ones who simply do not get the skills they need to complete a job application, read basic measurements, or run a cash register. This will be the one area that, if addressed, could have the largest impact on the region's ability to recruit, retain, and expand businesses. Vocational training was also criticized and there is a concern that the vocations are not applicable vocations to current business needs and growing industries.

The Southside Professional Development Schools Network exists in partnership with FSU, FAMU, TCC, and the City of Tallahassee. Professional Development Schools focus on improving pre-service and in-service teacher training and quality and using action research to improve student performance. The network began a number of years ago as a way to improve student performance in the SSA. Partnerships with the universities work towards the primary goal of improving student performance. Examples of partnerships include English Education and Nims-focus on literacy, speech/language pathology, and early childhood education for several elementary schools in the area.

- **Expanding upon the pharmacy and medical schools**
  The pharmacy school at FAMU and the new medical school at FSU certainly pose an opportunity to the community to begin to develop cluster industries around medical and pharmaceutical industries. Granted, neither of these schools have a major research focus; however, this should not impede the community from capitalizing on these programs.

- **Workforce Plus success and future role**
  Workforce Plus offices in the SSA receive increasingly heavy traffic by those who want to enhance their skill sets and improve their career options. This presents an opportunity to better link Workforce Plus with TCC's training programs that are focused on future target industries and companies.

Sites and Infrastructure

	Strengths	Opportunities
SITES & INFRASTRUCTURE	• Good plans • Utilities • Airport • Available sites • Railroad (CSX, Amtrak) • Tax and utility rates	• University land • Capital Circle expansion • Fairgrounds redevelopment • Southwood development • Student housing needs • Funding for improvements
	Weaknesses	**Threats**
	• Concurrency and related development fees • Transportation access • Railroad line's impact on FAMU	• Enforcement of regulations • Implementation of plans

Utilities and business sites are assets in the SSA. Transportation access is poor and has been cited as the major barrier to business development throughout the SSA. Although several plans have addressed issues of concurrency, code enforcement and open storage, these issues continue to hamper the development of the SSA. Funds from Blueprint 2000 and the Neighborhood Infrastructure Enhancement Program will certainly aid this area of the community in future business development.

However, there are aspects of sites and infrastructure that could hold the community back from realizing it's economic opportunities. These include:

- **Open storage of equipment throughout town**
  Found throughout the SSA are areas where bulky items such as large equipment and vehicles to be repaired or demolished are stored. This is extremely detrimental to the image of the SSA. AE understands that code enforcement officers do attempt to improve this situation, but perhaps there are not enough resources devoted to code enforcement or the regulations need to be more robust to not allow this type of storage except in specific areas, and only with appropriate vegetative screening. Additionally, it appears that there are varying levels of regulation and enforcement between the city/county related to standards requiring properties to meet codes after slight alterations in the property.

- **Improving transportation access**
  Access to and from the airport, as well as to/from Northeast Leon County to Southwest Leon County is poor. This is not a new issue and stakeholders have recently agreed to focus on the airport gateway project, including a route from the airport to downtown and the corridor from I-10 to the airport. The airport gateways will be handled by Blueprint funding but there may still be too many traffic signals to provide a significant incentive for business development in the SSA. The long-range transportation plan, which is now a regional plan due to the Metropolitan Planning Organization's (MPO) recent inclusion of parts of Gadsden and Wakulla County will hopefully address a larger regional issue which is how can the region take advantage of better transportation access to the airport.

  Concurrency is another issue that has come up in all focus group discussions and most interviews. Input suggests that Tallahassee demands a higher level of service than many of its competitor communities. Having this higher level of service demand yields a much higher cost to developers and business owners. Recognizing that concurrency is a state-mandated program, the City/County may consider revising their regulations so as to ease the cost in this area of town.

- **Funding capital improvements**
  There are two sources of funds for major capital improvements in the SSA. The current sales tax money is going toward City and County identified projects, including a major reconstruction of Jack McLean Park across from the Fairgrounds and $1.8 million for gateway improvements on South Adams. Future sales tax monies are mostly directed to Blueprint 2000 projects. Other sources of funds include the $50 million dollar Neighborhood Infrastructure Enhancement Program (NIEP), which the City Commission recently adopted. These funds include approximately $35 million for South Monroe. Community Redevelopment Area (CRA) monies represent another pool of funds for major capital projects. Funds from the CRAs are currently being generated through tax and special assessment districts.

- **The airport is an asset**
  Tallahassee Regional Airport continues to provide the lowest average airfare in a survey of 10 regional airports. It was the seventh straight quarter Tallahassee Regional had recorded the lowest average fare. The average fare at Tallahassee Regional was $138.57. Jacksonville placed second with $140.45 and Atlanta third with an average of $148.47.

Airfare Comparisons	
Tallahassee, FL	$138.57
Jacksonville, FL	$140.45
Atlanta, GA	$148.47
Pensacola, FL	$153.56
Austin, TX	$161.86
Jackson/Vicksburg, MS	$171.36
Panama City, FL	$198.37
Valdosta, GA	$212.04
Dothan, AL	$223.79
Albany, GA	$236.43

  This is a regional airport in that it serves several counties adjacent to Leon County. Yet, the transportation access to/from the airport and I-10 is poor. Widening of Capital Circle will help in improving this access, but it will still continue to be a limiting factor unless stoplights are reduced further than what is planned. With better access comes increased demand for service, which allows the airport to become a larger figure in this region of Florida and the United States.

- **Available land and sites**
  The Southern Strategy Area has nine industrial sites and several shopping center and retail strips within its boundaries. Approximately 25% of all industrial square footage in Leon County is located within the SSA.[1] Two of these industrial parks, adjacent to the airport along Capitol Circle, have no tenants. Much of this is due to transportation access issues and perceptions of the SSA as having high crime and low performing schools.

  The areas that have the most potential for redevelopment are along South Monroe towards Capital Circle and the relatively new Southwood development, which will benefit the SSA, and Southeast Tallahasee/Leon County towards Innovation Park. Specifically, the following properties merit the most attention as potential redevelopment sites in Southern Tallahassee/Leon County:

  ✓ **Fairgrounds (142 acres)** – This traditional fairgrounds area is being analyzed for a potential redevelopment area. Consultants and staff are considering many issues related to this but are most concerned about a relocation site for the Fairgrounds. If this site were redeveloped as a high-end mixed use development utilizing traditional neighborhood design concepts, it could anchor the southern portion of South Monroe and provide the impetus for the redevelopment of this area. Combined with an FAMU campus expansion to South Monroe on the north end, South Monroe could then become a major gateway into the community.

  ✓ **Innovation Park/FSU Golf Course** – As has been mentioned earlier, Innovation Park has yet to realize its potential. A recent study by the Urban Land Institute looked at the potential of this area combined with other adjacent and nearby land. This study, called *University Park*, is a holistic and exhaustive study that represents a model that could have an immediate positive impact in the SSA and the rest of

[1] "State of the Southern Strategy Report", Table 4 (source: City of Tallahassee and Leon County Building Inspections Office, 2002).

the community. The plan calls for a combination of housing and business uses, along with amenities such as active and passive recreation facilities. The Education Quadrant concept that has also been discussed among the universities could potentially work as a catalyst for the University Park plan.

- ✓ **FAMU Master Plan** – FAMU has a master plan that would have the university moving towards South Monroe. This master plan has not yet received regulatory approval. However, with FAMU expanding east, South Monroe seems to be a logical street to focus Gateway improvements, rather than Adams.

- ✓ **Colin English Property (1,000 acres)** – This property is mostly vacant of buildings. To date there have been no plans to develop this site, but its location between Southwood and the SSA could create more job opportunities for southern Tallahassee/Leon County residents.

Quality of Life

	Strengths	Opportunities
QUALITY of LIFE	• Lake Bradford and Southwood neighborhoods • New recreation center and pool in SSA (Jack L. McLean Jr., Park) • Older housing stock • Churches • Cultural resources • Festivals • Universities (sport events) • Biking trails • Canopy streets	• Student housing needs • Neighborhood Enhancement Program • Blueprint 2000 project financing • FAMU/FSU HUD study to address community development improvements in SSA. • FAMU Master Plan's impact on South Monroe • Fairgrounds redevelopment • Gaines Street redevelopment • Civic Center expansion
	Weaknesses	**Threats**
	• First impressions from Airport into City/County (Gateway) • Crime • Dilapidated buildings • Enforcement of incompatible uses • Open storage and very little screening • Entertainment venues (live music) • Eating and retail establishments	• Image of SSA being crime ridden • Lack of implementation (Gaines Street Redevelopment)

The quality of life in Tallahassee/Leon County is good. **Overall, residents and business leaders are very satisfied with the pace of life, the climate, and access to recreation opportunities, safety, churches, and schools.** Within the SSA, residents and businesses note the lack of entertainment and retail establishments. **One of the biggest issues that hamper improvements in this type of business development is the image of the community.** This issue has come up in every other plan that has been developed for the SSA.

However, there are aspects of quality of life that will hold back the economic growth of the community if not confronted. These include:

- **Lack of quality retail, entertainment and nightlife**
  A few small-scale restaurants exist but few if any entertainment venues exist south of Gaines Street. This is surprising, given the proximity of two major universities. Gaines Street redevelopment could provide a good entertainment venue for mostly FSU students and possibly FAMU students, but South Monroe from Gaines to Magnolia could prove to be additional sites for arts and entertainment venues. Besides public art that exists downtown, it is rare to see any significant civic spaces for celebrating public art, culture, diversity, or entertainment. These are opportunities that could help to spur additional private sector interest in the SSA.

Large-scale Mosaic representing musical traditions and diversity of neighborhood.

The downtown CRA is a very good idea that could bring needed public sector improvements which will undoubtedly encourage private sector investment downtown.

- **South Monroe could be a very special gateway**
Image has been mentioned in both the South Monroe Sector Plan as well as the Southern Strategy Area Plan. A gateway project can come in many forms, but one that AE often refers to is a visual gateway such as the one to the right.

  More important than just a **physical gateway enhancement project**, however, is the cleaning up of businesses along South Monroe. This is discussed in more detail in the Sites and Infrastructure section.

Gateway near Texas State Capitol indicating redevelopment area in Austin

- **Parks and Recreation are Assets**
The following are major parks and recreational assets in SSA:
  - ✓ Lake Bradford
  - ✓ Tallahassee Museum of Natural History
  - ✓ New Jack L. McLean Jr., Park
  - ✓ Private FSU Golf Course
  - ✓ Capital Park
  - ✓ Jack Gaither Golf Course
  - ✓ Spring Fax Park
  - ✓ Fairgrounds

  These are good quality of life assets for the SSA residents and businesses. Additionally, with the canopy streets, and the hike and bike trails that are throughout the city/county, this area of quality of life is certainly one of the biggest assets throughout the community.

- **Housing Supply**
The two housing issues that are and will continue to be a problem in Southern Tallahassee/Leon County are affordable housing and high-end housing. First of all, as redevelopment occurs, gentrification will threaten the affordability of living in the SSA. The Bethel CDC has an affordable housing program, but much more will be needed than this program can provide. Southwood now provides a higher-end housing product that will help in business development in the SSA.

  The real opportunity, however, is student housing. FSU alone has a waiting list for student housing. As has been mentioned elsewhere in this report, the University Park and Education Quadrant concepts could provide a much needed housing supply for students that will help to spark more retail and entertainment businesses in this part of the community.

Economic Development Efforts

	Strengths	Opportunities
ECONOMIC DEVELOPMENT EFFORTS	• Greater Tallahassee Chamber of Commerce/EDC • Capital City Chamber of Commerce • City economic developer • Florida's Great Northwest • Enterprise Florida • St. Joe's	• Dual economic development planning efforts (complimentary) • Private sector support for economic development • One shared vision • Commitment to targeted marketing plan with a new brand theme • Community Redevelopment Areas
	Weaknesses	**Threats**
	• Historic private sector support for economic development • Lack of a shared vision • Image • Internal communications/alignment • Marketing efforts	• City and county cooperation and shared vision • Less stringent development codes and fees in neighboring counties

The following table illustrates the types of economic development that each major stakeholder in Southern Tallahassee/Leon County provides:

Entity	Role in Economic Development
City of Tallahassee	Airport, Planning, Community Redevelopment, Utilities and Infrastructure, Innovation Park, Financing Capital Improvements and Neighborhood Improvements.
Leon County	Airport, Planning, Community Redevelopment, Innovation Park, Financing Capital Improvements
Tallahassee Chamber of Commerce / Economic Development Council	Business Retention/Expansion, Business Recruitment, Marketing
Capital City Chamber of Commerce	Business retention and expansion
Bethel Church and Community Development Corporation	Community Enrichment, Business Startup, Affordable Housing
Leon County Schools	K-12 Education
Workforce Plus	Job Training, Skills Development, Business Retention/Expansion
Florida State University	University Master Plan, Community Development, Technology Transfer, Student/Faculty/Employee direct/indirect spending, Innovation Park
Florida A&M University	University Master Plan, Community Development, Technology Transfer, Student/Faculty/Employee direct/indirect spending, Innovation Park
Tallahassee Community College	Workforce Development, Business Retention/Expansion, and Recruitment

The Tallahassee Chamber of Commerce has traditionally been the lead economic development entity. Other entities have a specific role of focus. The city has an excellent economic development director who is working on redevelopment strategies associated with the CRAs, as well as other collaborative business development strategies. The private sector, except for its membership in both chambers, has been relatively absent from economic development, relative to what one normally sees in communities the size of Tallahassee/Leon County. Much of this is due to the dominance of the public sector. **Business expansion programs are good, but with only one person at the Economic Development Council to do most of this, the impact of his services and programs cannot reach their full potential.** Funding for capital projects is very good. **External and internal marketing efforts are not very targeted and can certainly be improved for Southern Tallahassee/Leon County since building its image is of paramount concern.** Leadership and staff are exceptional at all levels of economic development. In particular, the Chamber executive staff and board leaders seem to have the ears of the private sector and have some unique concepts such as University Park and Education Quadrant that they could get the private sector to support.

However, there are aspects of economic development efforts that will hold back the economic growth of the community if not confronted. These include:

- **Business retention and expansion programs**
  The Chamber of Commerce and Economic Development Council provide the majority of business retention and expansion services for Tallahassee/Leon County. Bethel CDC has a fledgling small business loan program, and the Enterprise Zone provides additional benefits to business relocating/expanding in the SSA. The Targeted Business Pilot Program is a good program, as are the Florida Enterprise Zone program, the Qualified Target Industry Tax Refund Program, and other similar business retention and expansion programs. The Small Business Development Center (SBDC) provides typical SBA financing and some counseling, but their programs are fairly limited.

  One area of economic development efforts that could be improved is to infuse more resources and be more collaborative and aggressive with the business retention and expansion programs. Additionally, there is some discussion about modifying the Enterprise Zone boundaries to include all of the SSA. Recognizing the limitations in making such a modification, the impact to SSA residents and businesses could be significant.

- **Business recruitment efforts**
  Most of the direct business recruitment efforts are managed by the Chamber/EDC. The leadership is strong and staff very capable. Enterprise Florida, the state economic development agency, as well as the Great Northwest provides economic development leads for Tallahassee/Leon County, but most business prospect leads are generated from site selector sources that the EDC utilizes. Their efforts are hampered by some of the other issues that have been discussed in this report such as the City/County collaboration, poor perception, transportation access, and basic workforce skill development. Resources seem adequate although deal-closing funds can help certain business recruitment efforts.

- **Marketing for economic development**
  A public relations program is being developed through the Mayor's task force on economic development. This "Civic Dialogue" group can help to improve the public relations issues that are apparent between the City and County.

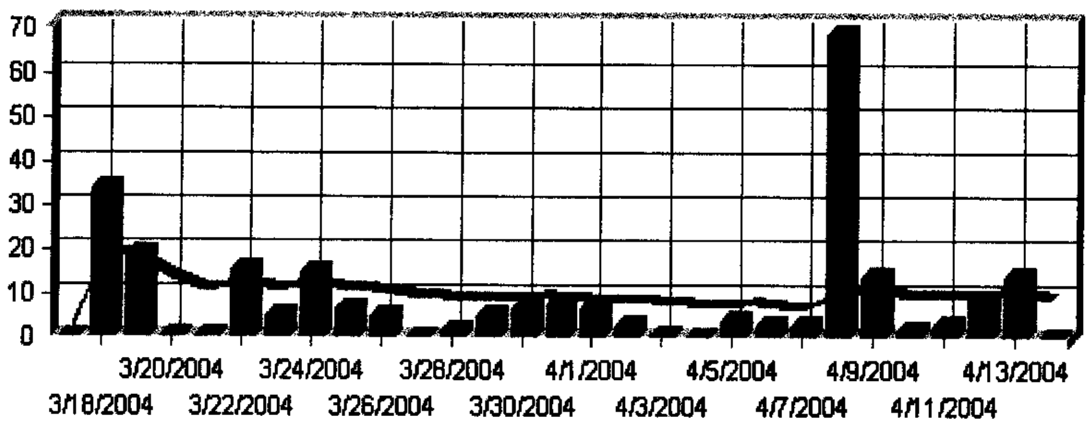
  Internal marketing efforts throughout the SSA and Tallahasee/Leon County can help in creating a more positive image within the community. For instance, college student council committees can aid in getting out the positive word. Internal marketing will be the first step towards repairing the poor perception that citizens and outsiders have of the SSA. **But, before this can occur, city and county leaders must agree on a shared vision for economic development.** Once the community has an improved perception of itself, and is better informed on economic development activities and the vision, the SSA and Greater Tallahassee will have more success in external marketing efforts.

APPENDIX

Tallahassee / Leon County Economic Development Survey

The purpose of this survey is for AngelouEconomics to identify additional needs of the citizens of Tallahassee / Leon County and strengths of the community. Based on the information tabulated, AE will form economic develo pment and marketing recommendations for Tallahassee/ Leon County. As of April 19, 2004 there are 117 responses. The Web site has had 257 unique visitors and had the most visitors on April 8, 2004. Below is a chart that shows the number of unique visitors on the www.GrowSSA.com website

Daily Unique Visitors

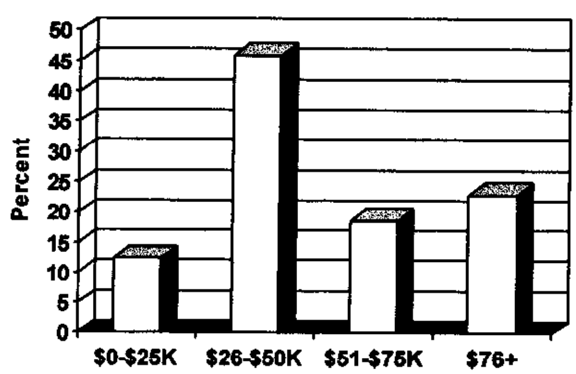


and the highest and lowest traffic dates.

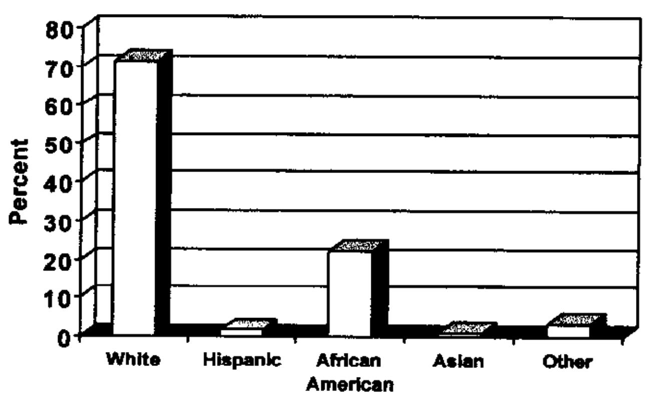
AngelouEconomics economic development survey focuses on three areas of Tallahassee / Leon County's economic environment.: (1) Tallahassee / Leon County demographics, (2) Tallahassee / Leon County's residents and employees degree of satisfaction, and (3) Tallahassee / Leon County's perception of economic development.

Demographics

Annual Income

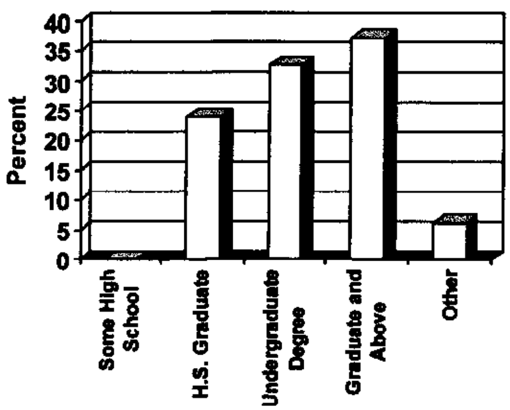


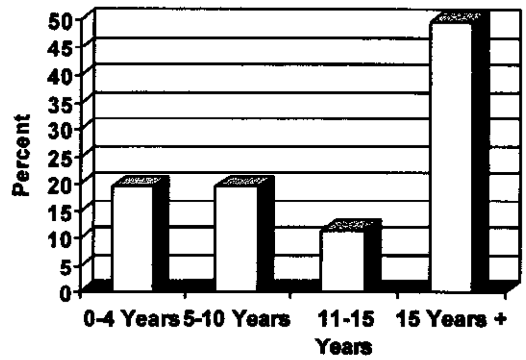
Ethnicity



Years of Education

Live in Tallahassee / Leon County





Of the 117 respondents, 37.2 percent live in the Southern Strategy Area of Tallahassee / Leon County and 31.6 percent work in the area. Over 60 percent of the respondents live and work outside the area, and therefore the survey responses are weighed heavily by an outside view. Only 39 percent of the respondents that work in Tallahassee / Leon County's Southern Strategy Area also live there.

Occupation
Top 5 Occupations of Survey Respondents

1. Management
2. Office and Administrative Support
3. Business and Financial
4. Community and Social Services
5. Computers and Mathematics

Industry
Top 5 Industries of Survey Respondents

1. Local Government
2. State and Federal Government
3. Utilities
4. Education, Training and Library
5. Public Administration

Satisfaction

Education

Highest Satisfaction – Community Colleges
Lowest Satisfaction – 6-8 Education

Livability

Highest Satisfaction – Family Environment and Climate
Lowest Satisfaction – Growth Management and Good Value Housing

Infrastructure

Highest Satisfaction – High Speed Internet Connectivity
Lowest Satisfaction – Public Transportation

Working Environment

Highest Satisfaction – Equal Opportunity
Lowest Satisfaction – Job Availability

General Economy

Highest Satisfaction – Image of the City as a Place to Live
Lowest Satisfaction – Location for High Tech Activity

Perception

Top three businesses survey respondents would like to see either expand or open in Southern Tallahassee and Leon County:

1. Restaurants and Music Venues
2. Museum and Cultural Center
3. Hotel

Top three industries survey respondents would like to see either expand or locate in Southern Tallahassee and Leon County:

1. Professional Services
2. Software Development
3. Healthcare

What does effective Economic Development mean to survey respondents?

1. New Companies Opening in Tallahassee / Leon County
2. More Jobs in Tallahassee / Leon County
3. Better Lifestyle Amenities

When it comes to marketing, what is most important to survey respondents?
Market to industry executives to get them to locate a business in Tallahassee / Leon County.

48.7 percent of survey respondents believe that Tallahassee / Leon County has a bad perception in the State of Florida, and over 92 percent believe that Southern Tallahassee has a bad perception in the Tallahassee region.

67 percent of respondents are satisfied with the shopping and retail business in the Tallahassee / Leon County Southern Strategy Area.

Tallahassee / Leon County's Biggest Assets:

1. Universities
2. Potential
3. State Government

Top one word descriptors used to promote Tallahassee / Leon County to a tourist or a business owner:

Beautiful
Friendly
Green
Environment
Growth
Opportunity
Potential
Enlightenment
Students
Diversity

Growth Expectations

The Chart below illustrates growth expectations of area businesses over the next few years: